

The background image shows a scenic view of a vineyard in the foreground, with rows of grapevines supported by wooden posts. In the middle ground, there are rolling hills covered in dense evergreen forests. The background is dominated by a thick layer of mist or fog that fills the valleys and partially obscures the distant hills. The sky is a warm, golden-orange color, suggesting a sunrise or sunset. The overall atmosphere is serene and natural.

OREGON WINE BOARD 2020-25 STRATEGIC PLAN



OREGON WINE BOARD



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OREGON WINE BOARD
STRATEGIC PLAN
2020-2025



OUR VISION



At the Oregon Wine Board, we firmly believe that a rising tide lifts all boats.

From our unique statewide position, the OWB is a critical partner to the Oregon wine industry. We work to raise the tide by cultivating an environment in which

our grapes and wines are coveted,

winegrowers and producers are well-equipped to compete,

all people are treated with equal respect,

and all are buoyed by our industry's collective success.

STRATEGIC PRIORITIES

1. ENHANCE THE REPUTATION OF OREGON WINE

What it means: OWB will define, protect and promote the reputation of Oregon wine globally.

Objectives:

- Establish a well-defined Oregon Wine brand with focused messages, attributes, and brand guidelines
- Promote statewide alignment to amplify and ensure consistency of brand message to external audiences
- Increase global awareness of the quality and breadth of the Oregon wine category
- Fuel research that sustains and advances wine and grape quality

Key activities:

- Programs that advance the Marketing & Communications Strategic Plan priorities, in particular:
 - New brand identity development and rollout
 - Media relations efforts that build brand image
 - Domestic and international trade education and awareness
- Solicit and fund research that addresses the Wine Quality pillar of Vit & Eno Research Strategic Plan

STRATEGIC PRIORITIES

2. DELIVER KNOWLEDGE & INSIGHTS

What it means: OWB will advance the industry's collective intelligence in support of growing, making and selling quality wines.

Objectives:

- Commission and curate technical, business and market research to advance industry practices
- Be the experts on the Oregon wine industry in support of telling its stories and communicating its impact
- Make data and insights easily accessible to industry members at all times
- Leverage funding and maximize knowledge-sharing through partnerships in research and education

Key activities:

- Solicit and fund research projects that address the Vit & Eno Research Strategic Plan priorities
- Industry education program addressing the most timely and crucial business and technical development needs
- Oregon wine industry studies, e.g. Vineyard & Winery Report, Economic Impact Study
- Actionable insights and information available and easily accessible to all industry members (including technical, market and consumer research)

STRATEGIC PRIORITIES

3. PROVIDE LEADERSHIP AND PARTNERSHIP

What it means: OWB will harness statewide strength to unite and empower the Oregon wine industry.

Objectives:

- Prioritize activities that will have greatest impact on the advancement of the statewide industry
- Establish development opportunities for regional associations appropriate to their lifestage needs and in service to the advancement of Brand Oregon
- Institutionalize venues for cooperation and input-gathering among regions and other industry groups

Key activities:

- Constitute, charter and administer committees with statewide representation
- Articulate and publish opportunities and guidelines for industry groups to access OWB resources
- Provide opportunities for intra-industry information and ideas sharing
- Make information about the OWB, its activities and opportunities for involvement clear and easy to access across its main communications channels



SUCCESS REQUIREMENTS

STRATEGIC PARTNERSHIPS

Create strong partnerships with wine and industry-tangential organizations to amplify our work

- Establish venues for Board-level interaction among key industry groups
- Strengthen key partnerships in service to strategic pillar objectives (e.g. OSU, Travel Oregon)

TRANSPARENCY

Achieve clear priority-setting, transparent resource allocation, and unambiguous communication

- Improve clarity and ease of access to information regarding budgeting and resource allocation
- Publicize goals and strategies that drive decision-making and influence programming
- Be clear about what is in-scope and what is out-of-scope over next 3-5 years

PROFESSIONAL DEVELOPMENT

Sustain and grow capabilities through professional enrichment and continuing education opportunities

- Support relevant continuing education opportunities for all staff members
- Advance Board and staff understanding of topics of equity and inclusion

METRICS OF SUCCESS

Institutionalize a process for tracking and communicating progress through measurable metrics

- Identify key metrics to monitor progress against strategic plan
- Develop scorecard to track and communicate metrics to stakeholders



APPENDIX A

STRATEGIC PLAN ON A PAGE

OREGON WINE BOARD STRATEGIC PLAN ON A PAGE

MANDATE / MISSION

OWB's legislated mandate is to promote Oregon's wine-grape growing and winemaking industries and to support research to develop sustainable wine and wine grape business practices within Oregon.

VISION

The OWB firmly believes that a rising tide lifts all boats. In its unique statewide position, the OWB is critical partner to the Oregon wine industry working to raise the tide by cultivating an environment in which our grapes and wines are coveted, winegrowers and producers are well-equipped to compete, all people are treated with equal respect, and all are buoyed by our industry's collective success.

STRATEGIC PRIORITIES

ENHANCE THE REPUTATION OF OREGON WINE

Define, protect and promote the reputation of Oregon wine globally

DELIVER KNOWLEDGE & INSIGHTS

Advance collective intelligence in support of growing, making and selling quality wines

PROVIDE LEADERSHIP & PARTNERSHIP

Harness statewide strength to unite and empower the Oregon wine industry

SUCCESS REQUIREMENTS

TRANSPARENCY: Achieve clear priority-setting, transparent resource allocation, and unambiguous communication

STRATEGIC PARTNERSHIPS: Create strong partnerships with wine and industry-tangential organizations to amplify our work

PROFESSIONAL DEVELOPMENT: Sustain and grow capabilities through professional enrichment and continuing education opportunities

METRICS OF SUCCESS: Institutionalize a process for tracking and communicating progress through measurable metrics



APPENDIX B

FUNCTIONAL STRATEGIC PLANS

OWB VIT & ENO RESEARCH STRATEGIC PLAN

MISSION

The Oregon Wine Board operates for the “purpose of supporting enological, viticultural and economic research to develop sustainable business practices for wine grape growing and wine making within Oregon and supporting the promotion of Oregon’s wine grape growing and wine making industries.”

VISION

OWB’s V&E Research program will champion continuous improvement of Oregon’s capacity to produce world-class wines that reflect a sense of place by sponsoring industry-leading research in the development of sustainable practices and climate-adaptive skills.

STRATEGIC PILLARS

WINE QUALITY

Support advancements in wine quality and site expression by enhancing markers of quality in the vineyard and winery

SUSTAINABLE PRODUCTION

Lead in developing sustainable practices to minimize inputs and reduce impact

CHANGING CLIMATE

Facilitate adaptation of vineyard and winemaking practices to future climatic conditions

FOUNDATIONAL RESEARCH

Foster V&E discovery that has the potential to provide foundations for future applications that address the other three strategic pillars

SUCCESS REQUIREMENTS

METRICS OF SUCCESS: Pre-specify and measure markers of relevance, quality and utility of results

ECONOMIC IMPACT: Quantify and inform financial impact of implementation

EDUCATION & OUTREACH: Enable industry to integrate results into vineyard and winery practices

OWB MARKETING & COMMUNICATIONS STRATEGIC PLAN

MISSION

The Oregon Wine Board operates for the “purpose of supporting enological, viticultural and economic research to develop sustainable business practices for wine grape growing and wine making within Oregon and supporting the promotion of Oregon’s wine grape growing and wine making industries.”

VISION

OWB’s Marketing & Communications program will cement Oregon as an essential selection for fine wine enthusiasts and professionals worldwide by championing demand-led growth for the long-term viability of Oregon’s wine industry

STRATEGIC PILLARS

BRAND EQUITY

Elevate the esteem of the Oregon Wine brand globally

MARKET EXPANSION

Build multi-tier trade demand to generate growth opportunities

WINE TOURISM

Champion high value, engaged and sustainable wine tourism statewide

INSIGHTS & INTEGRATION

Enrich industry intelligence, dialogue and alignment

SUCCESS REQUIREMENTS

INDUSTRY EDUCATION: Offer educational programs that equip wineries to maximize OWB MarComm efforts for their businesses

STRATEGIC PARTNERSHIPS: Clarify roles and facilitate alignment to maximize efforts throughout Oregon’s wine and tourism ecosystem

METRICS OF SUCCESS: Track, measure and report on key metrics to show progress and inform annual planning



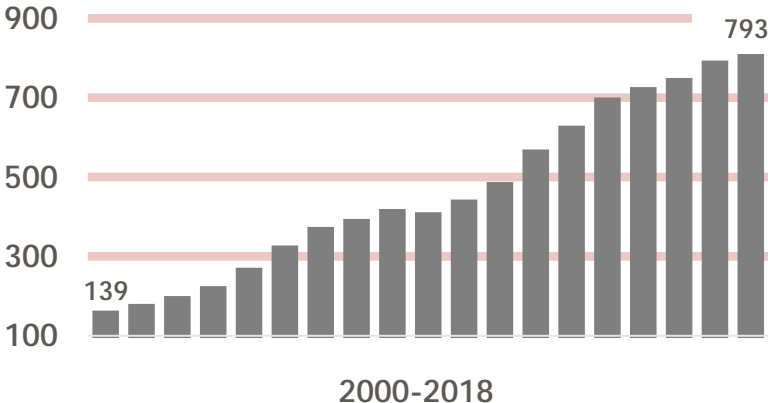
APPENDIX C

CONTEXT: INDUSTRY

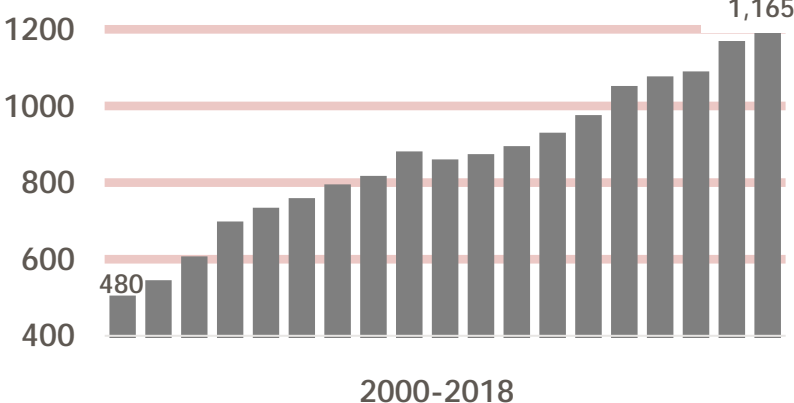
OREGON WINE BUSINESS GROWTH

The number of wineries has grown nearly 6-fold since 2000, and the number of vineyards has increased almost 250%

NUMBER OF OREGON WINERIES



NUMBER OF OREGON VINEYARDS

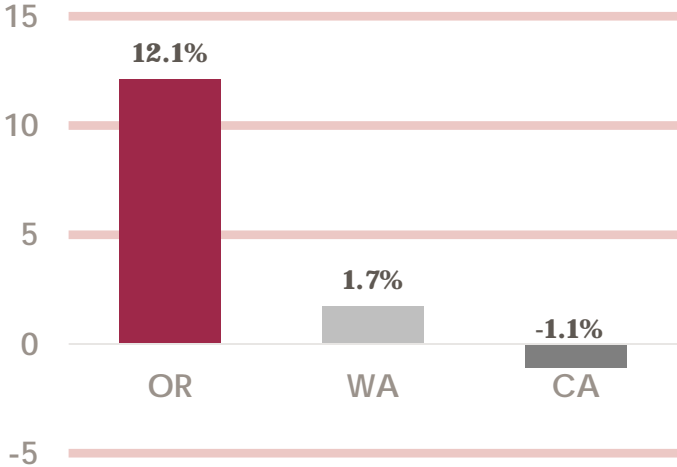


Source: Oregon Vineyard & Winery Report, 2000-2018

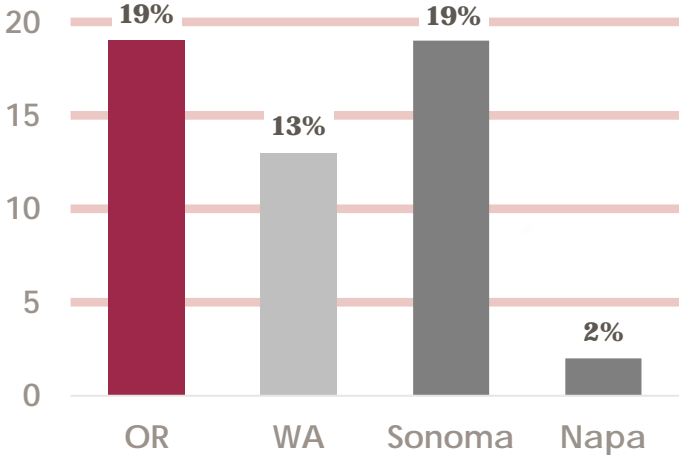
OREGON WINE GROWTH ACROSS CHANNELS

In retail and direct channels, Oregon leads volume growth among other major domestic wine producing regions.

**RETAIL VOLUME GROWTH
(2018 VS 2017)**

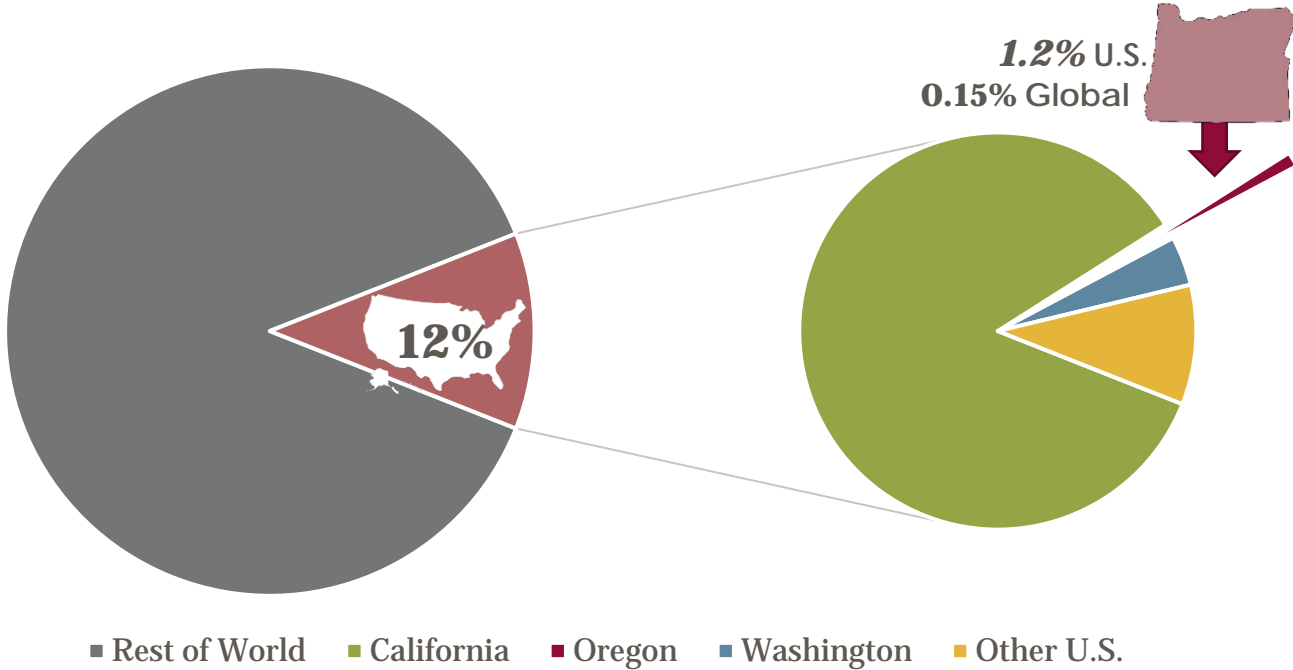


**DTC SHIPMENTS VOL. GROWTH
(2018 VS 2017)**



OREGON WINE IN THE GLOBAL CONTEXT

Despite impressive growth rates in plantings, production and sales, Oregon remains a small player on the world wine stage, accounting for just over 1% of U.S. wine production and about 0.15% of global wine production.

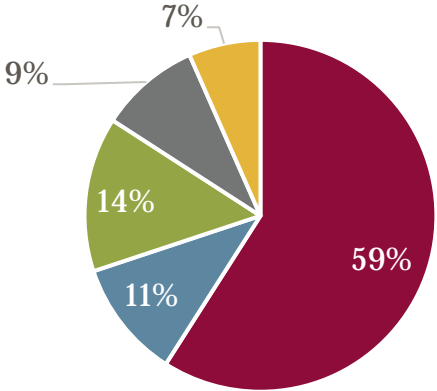


Source: Oregon Vineyard & Winery Report, 2010-2018, OIV, California Wine Institute, Washington State Wine

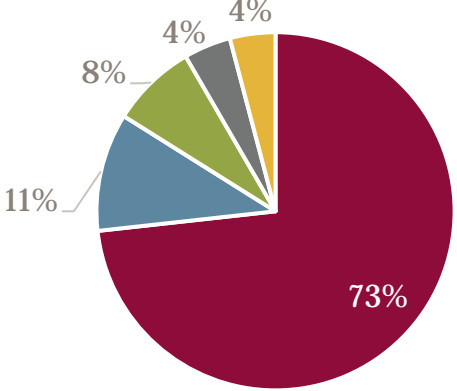
OREGON'S GRAPE HARVEST AND CRUSH BY REGION

Wine grape growing and winemaking in Oregon is concentrated in the northern part of the Willamette Valley. Growing regions to the south and east comprise about 40% of harvested tons and just over a quarter of the crush. These figures have only changed moderately over the past 10 years.

2018 HARVEST (TONS)



2018 CRUSH (TONS)



- North Willamette Valley
- South Willamette Valley
- Rogue Valley
- Umpqua Valley
- All other

Source: Oregon Vineyard & Winery Report, 2018

KEY EXTERNAL TRENDS: OREGON WINE IN 2030

Planning work done in 2018-19 by strategic committees for Research and Marketing & Communications anticipate these external factors as influencing the Oregon wine industry's future.



IMPLICATIONS OF
A CHANGING
CLIMATE



INCREASED VARIETY IN
SCALE OF OPERATIONS



INCREASED COST
OF PRODUCTION



INCREASED DEMAND
FOR SUSTAINABLE
FARMING



INCREASED POSITIVE
PERCEPTION OF
BRAND OREGON



DISTRIBUTOR
CONSOLIDATION



SHIFTING CONSUMER
DEMOGRAPHICS &
NEEDS



EXPANSION OF DTC
SALES CHANNELS AND
VOLUME

APPENDIX D

CONTEXT: ORGANIZATION

OWB FOUNDING LEGISLATION (HB 3442, 2003)

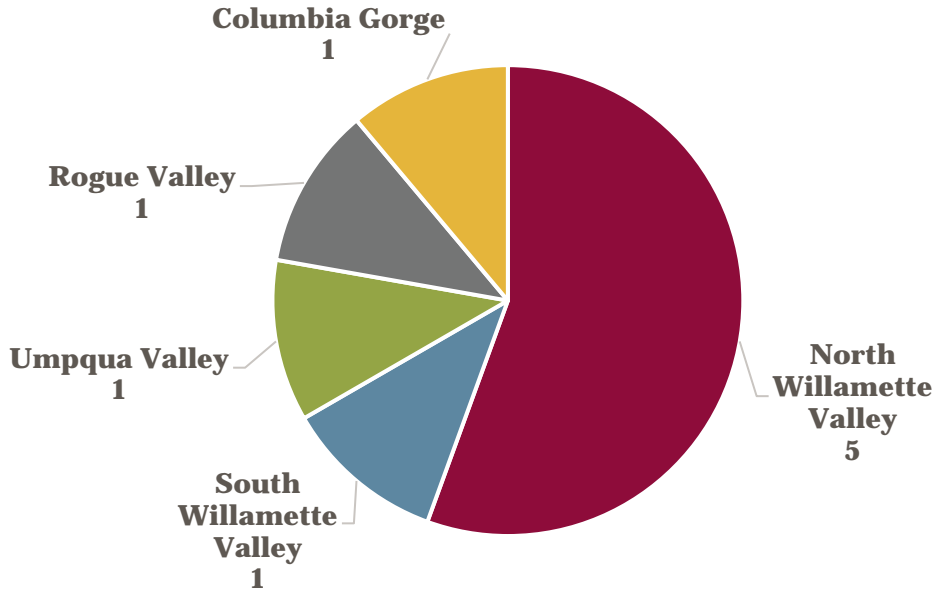
WHAT IT SAYS

“The Oregon Wine Board shall operate for the purpose of supporting enological, viticultural and economic research to develop sustainable business practices for wine grape growing and wine making within Oregon and supporting the promotion of Oregon’s wine grape-growing and winemaking industries.”

HOW WE DO IT

- Marketing
- Viticulture & Enology Research
- Media Relations
- Education

2020 BOARD COMPOSITION: REGIONAL REPRESENTATION

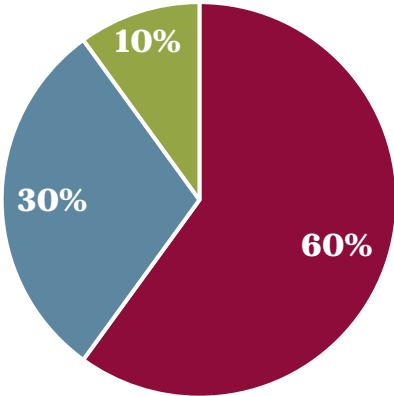


OREGON WINE BOARD FUNDING

The Oregon Wine Board’s approved 2020-21 operating budget is \$2.9 million. Funding is derived in large part from the grape tax, assessed at \$25 / ton. Although tons harvested and the number of OWB stakeholders has grown significantly over time, the tax rate has remained the same since 1983. It would take \$64 in 2020 to match \$25 in 1983.

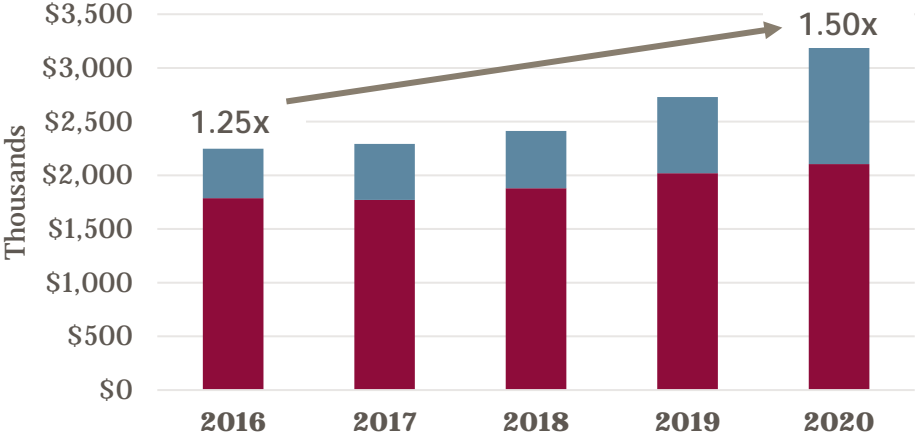
The OWB’s tax funding is augmented by grants supporting a variety of programs.

FUNDING SOURCES



■ Taxes ■ Grants ■ Fees

GRANT IMPACT OVER TIME



■ Grape Assessment ■ Grants